
Elementor Pro Form Widget – Salesforce CRM (Premium)

Installation

WordPress Dashboard

- Go to 'Admin' -> 'Plugins' -> 'Add New'.
- Click on 'Upload Plugin'.
- Upload plugin zip.
- Activate plugin.

WordPress Multisite Network Dashboard

- Go to 'Network Admin' -> 'Plugins' -> 'Add New'.
- Click on 'Upload Plugin'.
- Upload plugin zip.
- Only install plugin zip in 'Network Admin' and do not activate it.
- Activate plugin site wise ('Site' -> 'Admin' -> 'Plugins').

Configuration

- Go to 'Admin' -> 'Elementor' -> 'Salesforce CRM'.

Integration Method: API

W

Elementor Add-ons

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Configuration

Integration Method

☒ API ☐ Web-to-Lead or Web-to-Case

Environment

☒ Production ☐ Sandbox

Domain (required)

Consumer Key (required)

Consumer Secret (required)

Authorize

Callback URL: https://example.com/wp-admin/admin.php?page=epfw_sf

API Error Logs

No API error logs found.

- Create Connected App in Salesforce CRM to get Consumer Key and Consumer Secret. The guide is [here](#).
- Environment: Select Production or Sandbox environment.
- Domain: <https://login.salesforce.com/>
- Consumer Key: Add your Salesforce Connected App Consumer Key.
- Consumer Secret: Add your Salesforce Connected App Consumer Secret.
- Click on 'Authorize' button.

Integration Method: Web-to-Lead or Web-to-Case

Elementor Add-ons 0 + New

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Configuration

Integration Method ☐ API ☒ Web-to-Lead or Web-to-Case

Environment ☒ Production ☐ Sandbox

Organization ID (required)

Authorize

Custom Fields

Object (required)

Field Label (required)

Field Name (required)

Field Type

Add Custom Field

- Salesforce CRM Environment: Select Production or Sandbox environment.
- Organization ID: Add your Salesforce Organization ID. The guide is [here](#).
- Click on 'Authorize' button. Also, you can add custom fields for Web-to-Lead or Web-to-Case.
 - Object: Select an object.
 - Field Label: Add field label.
 - Field Name: Add field name.
 - Field Type: Add field type.
 - Click on 'Add Custom Field' button.

Integration

Edit Form

- Content
- Style
- Advanced

Form Fields

Buttons

Actions After Submit

Add Action

- Collect Submissions
- Email
- ConvertKit
- Mailchimp
- Slack
- Discord
- Salesforce CRM - Case
- Salesforce CRM - Contact
- Salesforce CRM - Lead**
- Popup

Additional Options

Need Help ?

UPDATE

First Name

Last Name

Email

Company

Subject

Message

File

Browse... No file selected.

Send

Drag widget here

- Click on the form.
- Click on the section 'Actions After Submit' on the left.
- Click in the 'Add action' field and select the action you need.

- Salesforce CRM – Case
- Salesforce CRM – Contact
- Salesforce CRM – Lead

Edit Form

Actions After Submit

Collect Submissions

Email

Salesforce CRM - Lead

Action Event

Create Object Record

Campaign

User Conference

Fields

first_name

last_name

Form Field

last_name

Lead Field

Last Name (Data Type: string and Field: req.)

email

company

subject

message

file

lead_owner_id

record_type_id

+ ADD ITEM

UPDATE

First Name

Last Name

Email

Company

Subject

Message

File

Browse... No file selected.

Send

Drag widget here

- After selecting the action, you will see the action section.
- Select 'Create Object Record' or 'Create/Update Object Record' action event.
 - Create Object Record: On form submitted, it will add record.
 - Create/Update Object Record: If form submitted email address match with existing record, it will update record. If form submitted email address not match with existing record, it will add record.
- Select a campaign if you want to add Contact or Lead to your Salesforce CRM Campaign.
- Map Elementor Pro Form Widget form fields to Salesforce CRM object fields.
Below object wise fields are required in the Salesforce CRM and it must be mapped with Elementor Pro Form Widget form fields.

- Click on "+ ADD ITEM".
- Form Field: Add form field ID.
- Lead/Contact/Case Field: Select a Lead/Contact/Case field.
 - Case: Case Origin.
 - Contact: Last Name.
 - Lead: Last Name and Company Name.

For 'Lookup Relationship' type fields (Lead Owner, Contact Owner, Record Type, Account, Contact, etc...), create hidden field in the form and map it with 'Lookup Relationship' type field.

- For Lead Owner, create hidden field in the form with value Lead Owner ID.
- For Contact Owner, create hidden field in the form with value Contact Owner ID.
- For Record Type, create hidden field in the form with value Record Type ID.
- For Account, create hidden field in the form with value Account ID.
- For Contact, create hidden field in the form with value Contact ID.
- Click on 'Update' button.

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queries.

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